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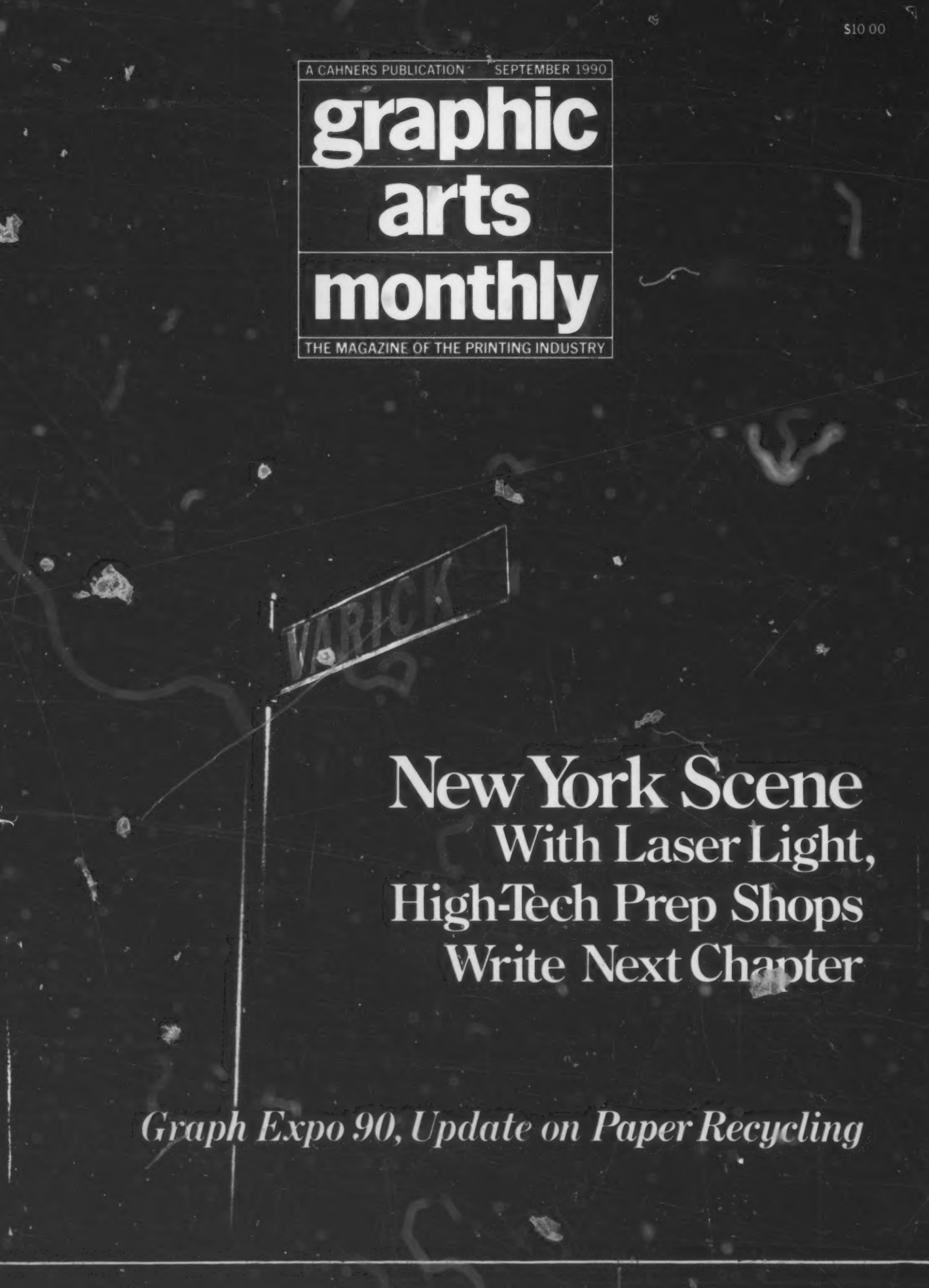
A CAHNERS PUBLICATION SEPTEMBER 1990

graphic arts monthly

THE MAGAZINE OF THE PRINTING INDUSTRY



New York Scene With Laser Light, High-Tech Prep Shops Write Next Chapter

Graph Expo 90, Update on Paper Recycling

VOLUME 62, NUMBER 9

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Trade Leads Revival of Economic Growth

The economy is poised to head upward after almost two years of slow growth. Cahners Economics forecasts the economy to grow 2.1% this year, after adjusting for inflation, and almost 3% in 1991. While growth will be relatively balanced throughout the economy, exports of goods and services will remain a bright spot.

The decline of the dollar since early 1985 produced rapid growth in exports. Over the past three years, export growth has averaged 14% per year after adjusting for inflation. While we expect growth to slow to about 6% per year for this year and next, that's still twice the rate of growth in the overall economy.

These projected trade increases assume continued efficiency in the U.S. manufacturing process, and a stable dollar relative to the currencies of our trading partners. Several recent developments indicate the upward movement could be much greater.

The economic integration of Europe, to be completed by 1991, will offer tremendous opportunities for U.S. manufacturers. Instead of the current fragmented system, an integrated European staff will be able to market standard products conforming to standard regulations.

The opening of Eastern Europe will offer similar growth opportunities for U.S. manufacturers. Fundamental changes in the economic and political systems must occur first, but, once development begins, the trade potential will be substantial.

Finally, recent trends indicate Japan will become less competitive in the international trade arena. Rising inflation has sparked an interest-rate upswing in Japan. Inexpensive capital, which has encouraged the investment that has fueled tradeable goods production, will decrease. Less competition from Japan will ensure greater penetration by U.S. manufacturers in the future.

In general, paper prices have remained fairly stable through the first half of this year, after falling significantly in late-1989. There is little expectation of further declines. Rather, paper prices are expected to remain stable through the end of 1990 before rebounding. Transaction price data shows a new surge beginning in certain types of paper, specifically directory-uncoated groundwood and bond-uncoated white papers. After an across-the-board decline this year compared to last year, paper transaction prices should see only modest gains in 1991.

PAPER TRANSACTION PRICES

				Annual % Change		
Paper Category ($/ton)	**Q2/89**	**Q1/90**	**Q2/90**	**1990**	**1991**	**1992**
Newsprint—30 lb. East	$ 578	$ 535	$ 535	-5.2	0.8	4.1
Directory—uncoated groundwood 22.5 lb. white	850	730	753	-7.1	3.8	4.2
Supercalendered—uncoated groundwood 34 lb.	830	830	800	-1.5	3.1	8.8
Offset—uncoated groundwood	675	635	635	-2.8	3.1	7.1
Offset—uncoated white 50 lb.	900	820	820	-4.1	1.3	8.3
Coated—No. 1 70 lb.	1625	1610	1610	-0.1	2.5	6.5
Coated—No. 3	1220	1250	1290	0.6	2.0	9.0
Coated—No. 5 34 lb. roto	1000	960	940	-5.0	1.1	5.7
Bond—uncoated white No. 1 20 lb.	1100	1080	1060	-1.7	1.1	8.5
Bond—uncoated white No. 4 20 lb.	1040	967	991	-3.6	1.3	9.2

What Dealers Want

An exclusive GAM survey reveals how dealers feel about a variety of important issues.

Graphic arts dealers are a diverse lot. Some are retailers, selling graphic arts supplies and/or equipment, others are brokers, some are actually distributors. Many specialize, in the hope of carving out their own niche and circumventing traditional dealer problems like a fickle buyer's market, price selling, manufacturer favoritism, or industry consolidation.

But are the problems mentioned above truly of concern to the typical graphic arts dealer? If you could gather several hundred dealers together and question them about their businesses, what would the collective answers be? GRAPHIC ARTS MONTHLY has done just that, in a recent exclusive survey, to determine how dealers feel about a variety of issues they face on a daily basis.

By Michael Karol
Managing Editor

The study was conducted by Cahners Publishing's Market Research Department, among a pool of 650 dealers listed in the *1990 Graphic Arts Monthly Sourcebook*. Two mailings were sent out in February and March of this year, garnering 208 responses, or a response rate of 33%.

Dealers were most vocal about the two issues they deemed "most important" to them: manufacturers bypassing the dealer community (cited by 26% of respondents), and equipment giveaways (22%). Other issues given weight by dealers include:

- manufacturer-direct sales of equipment and supplies to end-users (this sometimes results in dealers dropping manufacturer products and/or selling them less aggressively);
- manufacturer rebates, which one-third of respondents said are "losing their effectiveness";
- business consolidation among their customers; and
- exclusivity of product lines carried.

The dealers who responded to the survey handle, for the most part (78%), both printing equipment and supplies; 16% handle printing equipment only, and 6% carry only printing supplies. The majority of those dealers who handle equipment (85%) inventory locally, and 100% of those dealers carrying supplies indicated that they inventory supplies locally.

Eighty-two percent of respondents have a service department at their location. Roughly three-quarters (73%) said their dealerships are individually owned; 25% are part of a national chain. Average sales volume for 1989 for these 208 locations was $5.907 million.

On the most pressing of the issues facing graphic arts dealers—manufacturers' direct sales of equipment to end-users—54% of dealers who handle equipment said that such sales are increasing; 36% said those sales have remained the same; and 9% found the number to be decreasing. Of those dealers who handle supplies, 45% believe the number of manufacturer-direct sales of supplies to end-users has not changed; 42% say the number is increasing; and 9% said it was decreasing.

Overall, 47% of respondents indicated they would sell a manufacturer's products less aggressively if they continued to increase their number of direct sales; 37% said they would drop the manufacturer's products; 35% would open negotiations with the manufacturer; and 4.4% would shop for a competitive line. But 46% of dealers who handle equipment and 51% of dealers who carry supplies indicated that they have dropped manufacturer's products because of increasing direct sales to end-users.

(Continued on p. 114)

In the other "most important" issue affecting their business, respondents indicated there were an average of seven equipment giveaways (in their market areas) within the past 12 months which have directly affected their business. Most of the dealers (44%) said these giveaways had no significant impact on supply sales, although almost one-third (32.9%) felt the opposite, that giveaways had decreased supply sales. Some 17% reported equipment giveaways had the effect of increasing supply sales.

Dealers were vocal as to what action, if any, they take with regard to equipment giveaways. Some comments were: "None. A manufacturer will do as he pleases." "I started giving away equipment myself." "Notified them we would drop the line in the event of another occurrence." "Our hands are tied. You can't sue City Hall." "We are down to begging." "We changed suppliers." "Direct negotiations. We charged margin lost to manufacturer in some cases."

Other dealer issues were the cause of similar debate:

- Manufacturer rebates are believed to be beneficial by most (60%) of the respondents; 34% said rebates have lost their effectiveness as an incentive. "Add to profitability" (47%), "reinvest into the dealership" (27%), and "pass on savings to customers" (25%) were mentioned most often as way respondents made use of such rebates. General comments on the benefit or ineffectiveness of rebates ranged from, "In our competitive environment, smaller dealers sometimes sell at or near cost; therefore, the rebate is the profit," to "Equipment purchases are hardly ever made on an incentive basis," to a not-so-subtle, "Now manufacturers are prolonging the life of 'brain dead' dealers by feeding them intravenously."
- Sixty percent of dealers said they had not seen a significant number of business consolidation among their customers within the past three years. Of the rest, 38% reported a significant amount of customer consolidation, and 39% of these respondents indicated the consolidations have somewhat decreased business; 32% said they have somewhat increased business; and 21% said the consolidations have had no impact on business.

As to the impact of *manufacturer* consolidations on their businesses over the next two years, most dealers were in agreement with one who said, "The impact will be tremendous. There will be a lot of choosing sides."

Other comments: "I see deal-

What Sells a Manufacturer's Product?

	Extremely Important 6	5	4	3	2	Not Important 1	No Answer	Average Rate
Profitability	79.4%	16.7%	2.0%	0.5%	—	0.5%	1.0%	5.75
Manufacturer's overall reputation	52.9	32.8	10.8	1.0	0.5%	1.0	1.0	5.35
Delivery time	52.9	23.5	17.2	4.4	1.0	—	1.0	5.24
Completion of dealer order	43.6	32.8	16.2	3.9	—	0.5	2.9	5.18
Competitive price	44.1	31.9	16.7	4.9	0.5	1.0	1.0	5.12
Warranty service	44.6	27.0	19.1	5.4	1.5	1.0	1.5	5.06
Sales support & materials	40.7	30.9	21.1	4.4	1.5	0.5	1.0	5.04
Product training of dealer salesmen	35.3	31.4	22.1	7.4	2.0	1.0	1.0	4.89
New product development	28.9	36.8	25.5	5.4	1.5	1.0	1.0	4.84
Breadth of product line	26.5	32.4	24.5	10.3	3.4	0.5	2.5	4.68
Advertising & trade show support	13.7	23.0	33.8	18.1	7.8	2.0	1.5	4.11

BASE: 204 respondents
NOTE: Dealers were asked to rate the criteria below as to importance (6 = extremely important, 1 = not important) when selling a manufacturer's product. The closer the average rate is to "6.00", the more important the criteria.

erships evolving to one or two major line suppliers." "The day of being all things to all people is over." "We will narrow the number of lines we represent." "Instead of merely asking our customers what they want, we will be teaching our staff to sell aggressively the product lines which remain." "More direct sales. The independent dealer will be gone from major markets in three to five years. National chains will represent two or three manufacturers."

• Poor service support and training from manufacturers was a major issue for 8% of respondents. Dealers rated profitability as the most important product trait in terms of sellability, followed by manufacturer's overall reputation, delivery time, completion of dealer order, and competitive price. The most important sales support and training methods for equipment dealers were, in order, product literature, availability of training materials, and on-site customer training; for supplies dealers they were literature, sample availability, and availability of training materials.

Dealers commented that there were many incentives manufacturers could offer them to help achieve annual sales objectives, including: more selling help; more profitability, less giveaways; very close cooperation; pricing incentives; exclusive territories; joint calls to prospects; protection from manufacturer-direct sales; better sales reps and more frequent visits; good leads from national advertising; and more loyalty to the dealer. By far, exclusive territories, knowledgeable sales reps, and no giveaways were voiced most often.

The bottom line: dealers wish to be treated fairly and honestly, like most businesspeople. They would like a closer, stronger relationship with manufacturers, but they understand the realities of the business climate.

Most would be happy with, as one dealer said, "a mutual exchange of information and ideas" (no doubt coupled with rebates, an exclusive territory, and the most up-to-date sales and training methods available). Many would settle for the old standbys: quality product, good service, and on-time delivery. Nearly all are currently making do somewhere in between.

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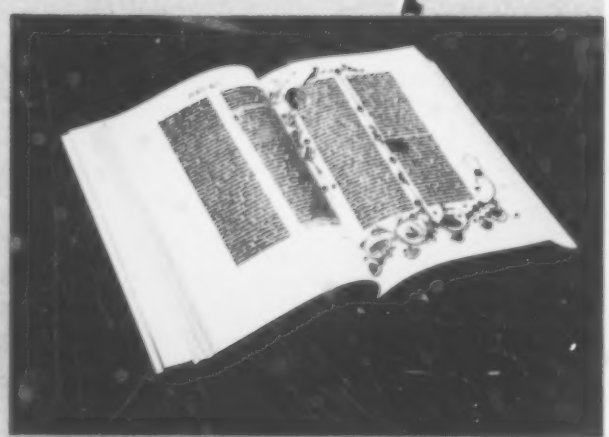

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Mid-Atlantic Region

The three Mid-Atlantic states are a pretty good match for each other. New York is the biggest by any measure (square miles, population, printing sites, traffic jam density, etc.), but all three are in the top 10 by population: New York ranks second with 17.8 million people, Pennsylvania fourth with 11.9 million, and New Jersey ninth with 7.6 million.

This has traditionally been a major printing industry hub, and still is. The commercial printing industry in these states produces an annual $13 billion in sales and employs more than 150,000 people. Furthermore, except for New York, the industry seems to be growing in the Mid-Atlantic.

Seems is the operative word. Look at the employment growth figures; you'll see that the big leader is New Jersey. Now look at the map. New York and Pennsylvania are big areas, but the overwhelming majority of the people in those states live in southwestern New York (New York City) or southeastern Pennsylvania (Philadelphia).

Both cities are afflicted with (among other things) high taxes and uncompromising unions. Suppose you're a printer in one of those places and you'd like to get away from the taxes and the unions: where are you going to go?

You cross the nearest river from either place and end up in New Jersey. That's almost entirely where the growth in New Jersey industry (note particularly "Other Manufacturing Growth") is coming from.

Jana Brenning

Unfortunately, crossing the Delaware or the Hudson Rivers doesn't make you independent of the region's economy, which is having something of a rough time. Housing prices in New York City have fallen about 16% in the last year, and, along with most other standard indicators, are at best flat, all the way from Massachusetts to Virginia.

What this probably means is a shakeout, during which competition—never very gentle in this market—is going to be even bloodier and more bare-knuckled than ever. If you're in it, watch your back.

Data for these reports come primarily from Printing Industries of America, the National Association of Printers and Lithographers, the U.S. Bureau of the Census, Trade and Technology Press of Stamford, Conn. (the publishers of *Printmarkets*, a highly useful source of industry data,) and GRAPHIC ARTS MONTHLY's own database.

Reprints of this installation of the Geography of Print may be ordered from Carol Bien, Cahners Publishing, Reprint Department, 1350 E. Touhy Ave., Des Plaines, IL 60018.

By Peter Johnston
Special Projects Manager

Regional Overview

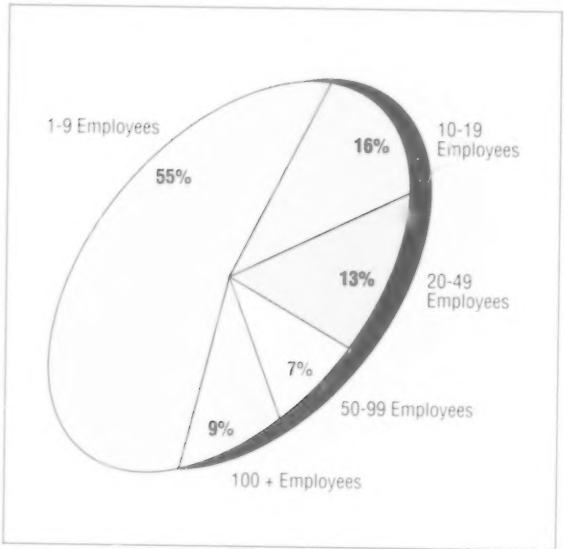
Note that these figures, taken from the GAM database, reflect the universe of printers in its widest sense. In most of the data on the next three pages, a smaller—though nonetheless still very large—universe of printers will be used. This is because we will be concerned with the way the printing industry in the Mid Atlantic region is divided up in terms of markets. This requires us to exclude newspapers, in-plant printers, and certain other plants These folks, while clearly printers, are not *economically measurable* as printers.

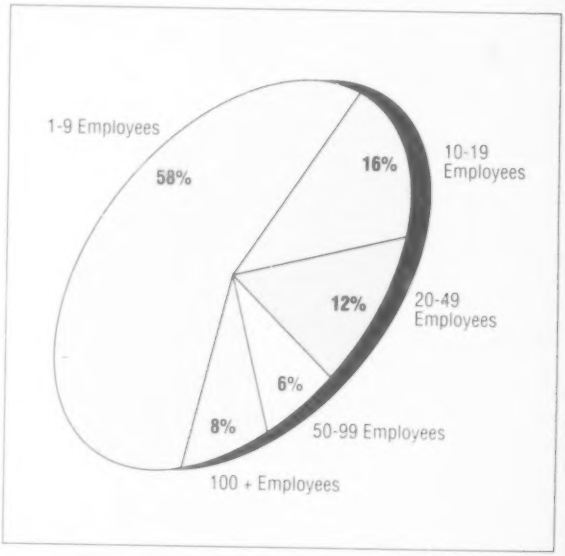
Mid-Atlantic Region, Plants by Employee Count

Size	# of Plants	% of Region
1–9 Employees	5,427	55%
10–19 Employees	1,579	16%
20–49 Employees	1,286	13%
50–99 Employees	655	7%
100 + Employees	879	9%
TOTAL	**9,826**	**100%**

United States, Plants by Employee Count

Size	# of Plants	% of Total
1–9 Employees	29,815	58%
10–19 Employees	8,381	16%
20–49 Employees	6,428	12%
50–99 Employees	3,147	6%
100 + Employees	3,846	8%
TOTAL	**51,617**	**100%**





Charts and graphs by Lisa Hilgers

Plants by Function

Overall, the Mid-Atlantic region accounts for about 19.3% of the total U.S. industry, measured by value of shipments (gross sales). Converters and trade printers are heavily concentrated here.

Function	# of Plants	% of U.S. Total
Commercial	5,040	19.3%
Newspaper (w/ Commercial)	208	12.8%
Newspaper (w/o Commercial)	357	15.9%
Book & Pub	481	18.9%
Business Forms	150	19.1%
Converters	473	25.3%
Noncommercial	1,440	18.8%
Trade	968	22.7%
Quick Printers	709	15.5%

Equipment Distribution

Equipment	Sites in Region	% of U.S. Total
Color Scanners	537	20.6%
Sheetfed Presses	6,831	28.8%
Heatset Web Offset Presses	801	21.0%
Folders	5,448	17.6%

These figures represent not pieces of equipment but sites where that equipment can be found. As can be seen, the region is over-represented in terms of almost everything. The enormous concentration of sheetfed capacity points to the New York City area's overwhelming importance in commercial and advertising printing. Newspapers are fewer in number and larger in circulation than the U.S. norm. Most of the web capacity, conversely, is in the region's smaller towns.

Commercial Printing

Value of Shipments

As noted in the introduction, all three of these states are printing powerhouses. At a total of $12.9 billion, the Mid-Atlantic region represents 19.3% of the nation's total commercial printing output. New York is the leader, with almost $6 billion, approximately 45% of the regional total. Pennsylvania has 31%, and New Jersey the remaining 24%. If current trends continue, New Jersey's share of the Mid-Atlantic total will probably increase.

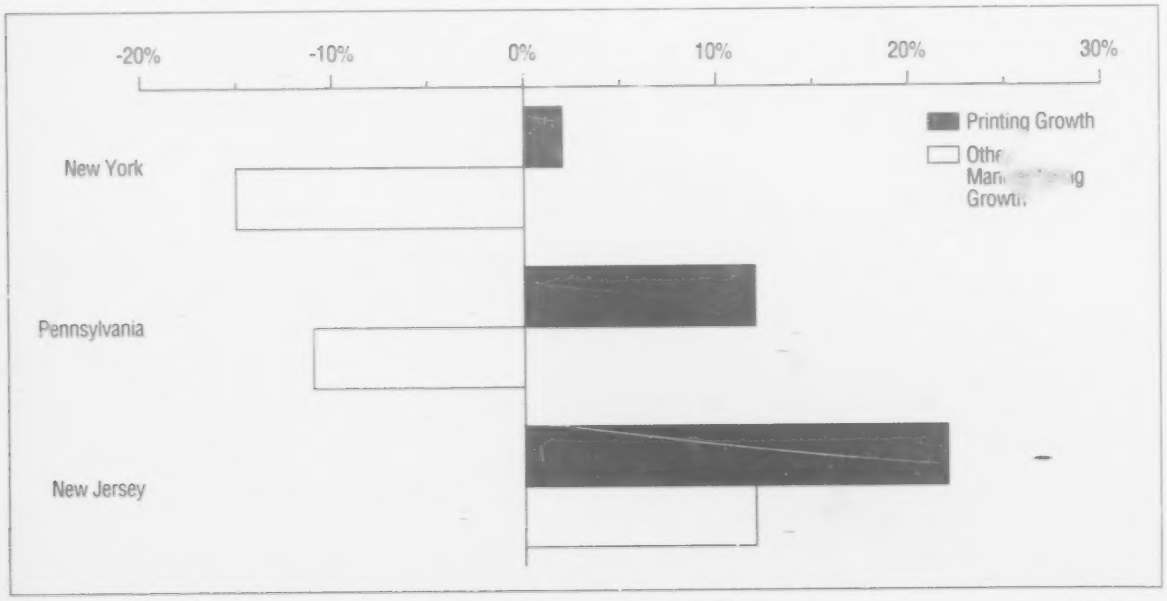
State	Sales	%
New York	5,800	45%
Pennsylvania	4,000	31%
New Jersey	3,100	24%
TOTAL	**12,900**	**100%**

Printing Sites

State	Sites	%
New York	3,984	54.8%
New Jersey	1,655	22.8%
Pennsylvania	1,633	22.4%
TOTAL	**7,272**	**100%**

If you compare sales for these states with number of sites you run into an interesting correlation. By these numbers, the average New York printer has sales of $1.5 million, as opposed to $1.9 million for New Jersey and $2.4 million for Pennsylvania. What this means is not that New York is a hotbed of small printers so much as that it has a lot of local activity. The other two states, especially Pennsylvania, have a heavy concentration of very high-volume plants printing for national markets (see list of large printers).

Printing Employment



In the introduction we discussed the probable source of New Jersey's healthy growth numbers—shrinkage from its neighbors. Pennsylvania seems to be managing some real growth in printing employment; in "other manufacturing" only New Jersey has positive numbers. It is worth noting that New York and Pennsylvania are both losing population; New Jersey, once again, shows a brighter picture.

States	Employees
New York	71,440
Pennsylvania	46,389
New Jersey	38,815
TOTAL	**156,644**

Leading Printers in Major Markets

Company, Location	Sales
COMMERCIAL/SPECIALTY Total 1438.6	
Day Timers Inc., East Texas, PA	126.0
Webcraft Tech., North Brunswick, NJ	115.0
Alford Industries, Ridgefield, NJ	77.2
The Topps Co., Brooklyn, NY	76.0
Keith Clark, Sidney, NY	72.0
Queens Group, Long Island City, NY	70.0
Shorewood Packaging, New York	47.7
Globe Ticket & Label, Warminster, PA	42.0
MacNaughton-Einson Graph., Fairlawn, NJ	40.0
Kimball Systems, Morris Plains, NJ	37.0
Winchell Company (Clondalkin), Philadelphia	32.0
Panel Prints, Inc., Old Forge, PA	32.0
Esselte Bus. Systems, Garden City, NY	32.0
H. W. Wilson, Bronx, NY	27.5
Ivy Hill Corporation, New York	27.0
Amsterdam Printing and Litho, Amsterdam, NY	26.0
Penn Corp. (Western Pub.) New York	25.5
The Lehigh Press, Pennsauken, NJ	25.0
Applied Graphics Technologies, New York	24.0
The Morrill Press (Engraph), Fulton, NY	24.0
American Bank Note Holographics, Elmsford, NY	21.9
Smith-Edwards-Dunlap Co., Philadelphia	21.0
The Colad Group, Buffalo, NY	20.0
Case-Hoyt Corporation, Chili, NY	19.0
Jostens Printing & Pub., State College, PA	15.0
Lasky Company, Milburn, NJ	15.0
Packard Press Corp., New York	14.2
Compton Press, Morris Plains, NJ	12.5
American Fiber-Velope Mfg. Co., Collingdale, PA	12.0
Direct Communications Group, Purchase, NY	12.0
Sandy Alexander, Inc., Clifton, NJ	10.9
Consolidated Revere Graph., Philadelphia	10.5
Panorama Press, Clifton, NJ	10.5
LaClede Mfg. Co. Inc., Tonawanda, NY	10.0
F. M. Howell & Co., Elmira, NY	10.0
Case-Hoyt Corp., Rochester, NY	10.0
Warren Press, Inc., New York	10.0
Hoechstetter Printing Co., Pittsburgh	10.0
Tabard/Copley Graphics, New York	9.0
Science Press (Monroe), Ephrata, PA	9.0
Laurel Printing Inc., Elmsford, NY	8.0
Latham Process Corp., New York	8.0
Corporate Printing Co., New York	8.0
Specialty Printers of America, Scranton, PA	8.0
Bowne & Co., New York	8.0
Herst Litho, Inc., New York	8.0
Mastercraft Litho (Alford), Ridgefield, NJ	7.0
Sorg Inc., New York	7.0
Deven Lithographers, Brooklyn, NY	7.0
Penn Colour Graph., Huntington Valley, PA	7.0
Tanagraphics, New York	6.5
Barton Press, West Orange, NJ	6.5
Paxar Corp., Pearl River, NY	6.5
The Adams Group, New York	6.0
Uniflex, Inc., Hicksville, NY	6.0
Bridge Litho., Inc., New York	5.5
International Envelope Co., Aston, PA	5.5
Manhardt-Alexander Inc., Amherst, NY	5.5
Hoffman Printing, Buffalo, NY	5.5
Charles P. Young Co., New York	5.0
Rixie Paper Products (Engraph), Pottstown, PA	4.5
Web Graphics, Glens Falls, NY	4.5
Master Eagle Graphic Services, New York	4.0
Monroe Litho (Graphic Ind.), Rochester, NY	4.0
JTC Corporation, Union, NJ	4.0
Aztech Financial Ptrs (Devon), New York	3.7
Waldman Graphics, Inc., Pennsauken, NJ	3.5
Intelligencer Printing Co., Lancaster, PA	3.5
Pearl-Pressman-Liberty, Philadelphia	3.0
Lehigh Litho (Alcom), Bethlehem, PA	3.0
Interform Corp., Bridgeville, PA	3.0
Pace Press (Metro Litho), New York	3.0
Horowitz/Rae Book Mfrs., Fairfield, NJ	3.0
Georgian Press, Inc., New York	3.0
Braceland Brothers, Inc., Philadelphia	2.5
Keener Mfg., Lancaster, PA	2.5
Denney-Reyburn Co., West Chester, PA	2.0
L.K. Litho, Middle Island, NY	2.0
Data Papers, Inc., Muncy, PA	2.0
Wise Business Forms, Butler, PA	2.0
Canterbury Press, Rome, NY	1.0
FINANCIAL/LEGAL Total 815.8	
Pandick, Inc., New York	170.0
Bowne & Co., Inc., New York	134.5
Safeguard Business Sys., Fort Washington, PA	100.0
United States Banknote Co., New York	62.0
American Bank Note Co., New York	59.2
Sorg Inc., New York	58.8
Charles P. Young Co., New York	40.0
R. R. Donnelley/Steel Way, Lancaster, PA	38.0
Packard Press Corp., New York	32.3
R. R. Donnelley, New York	30.0
Corporate Printing Co., New York	22.0
Aztech Financial Ptrs (Devon), New York	14.5
Julius Blumberg, Inc., New York	13.0
Latham Process Corp., New York	11.0
Scott Printing Corp., Jersey City, NJ	9.5
Financial Press (Donnelley), Pittsburgh	7.0
The Adams Group, Inc., New York	5.0
Panorama Press, Clifton, NJ	3.0
OCR Data Systems, Inc., Elmsford, NY	3.0
Wise Business Forms, Butler, PA	3.0
MAGAZINE Total 709.0	
R. R. Donnelley & Sons Co., Lancaster, PA	110.0
Maxwell Communications, Atglen, PA	65.0
Arcata Graphics Co., Depew, NY	60.0
Mack Printing Co., Easton, PA	50.0
R. R. Donnelley & Sons Co., Lancaster, PA	40.0
Quad/Graphics, Inc., Saratoga Springs, NY	40.0
Brown Printing Co., East Greenville, PA	35.0
Sullivan Graphics, Inc., Dunkirk, NY	30.0
Great Eastern Color, Poughkeepsie, NY	26.5
Hughes Printing (Monroe), East Stroudsburg, PA	25.0
The Sheridan Press, Inc., Hanover, PA	22.0
Watchtower Bible and Tract, Brooklyn, NY	22.0
Lancaster Press, Inc., Lancaster, PA	20.0
Sullivan Graphics, Inc., York, PA	20.0
The Sheridan Press, Hanover, PA	18.0
SLC Graphics, Inc., Pittston, PA	17.5
L. P. Thebault Co., Parsippany, NJ	15.0
Sowers Printing Company, Lebanon, PA	13.0
The Hibbert Group, Trenton, NJ	11.0
Wilcox Press, Inc., Ithaca, NY	10.0
Science Press (Monroe), Ephrata, PA	9.0
Able Printing Co., Cherry Hill, NJ	7.0
Braceland Brothers, Inc., Philadelphia	6.5
Jersey Printing Co., Inc., Bayonne, NJ	6.0
Packard Press Corp., New York	5.5
Haddon Craftsmen (Sullivan), Scranton, PA	5.0
Case-Hoyt Corporation, Rochester, NY	5.0
Penn Colour Graphics, Huntingdon Valley, PA	4.0
Canterbury Press, Rome, NY	2.5
Waldman Graphics, Inc., Pennsauken, NJ	2.5
L. K. Litho, Middle Island, NY	2.0
Balan Printing, Inc., Brooklyn, NY	2.0
Fort Orange Press, Inc., Albany, NY	1.0
Wickersham Printing Co., Inc., Lancaster, PA	1.0
BUSINESS FORMS Total 705.3	
Safeguard Business Sys., Fort Washington, PA	105.0
Vermont Computer Forms, River Edge, NJ	87.0
Transkrit Corporation, Brewster, NY	64.5
Paris Business Forms, Burlington, NJ	42.8
Interform Corporation, Bridgeville, PA	42.0
JTC Corporation, Union, NJ	38.0
Federal Business Products, New York	27.0
Vanguard Group, Huntington, NY	23.5
Bregg Data Forms, Inc., Hauppauge, NY	20.0
Esselte Business Systems, Garden City, NY	20.0
Web Graphics, Glens Falls, NY	20.0
Wise Business Forms, Butler, PA	20.0
Specialized Printed Forms, Caledonia, NY	19.7
Datatel Resources Corp., Monaca, PA	19.0
Hygrade Printing Corp., West Caldwell, NJ	18.5
Carci Alfi Forms & Labels, Hauppauge, NY	14.0
Spectra Graphics, Willow Grove, PA	13.0
Maggio Data Forms, Hauppauge, NY	13.0
Data Papers, Inc., Muncy, PA	10.0
Eastern Continuous Forms, North Wales, PA	10.0
SBF Communication Graph., Philadelphia	10.0
RMF Business Forms, Inc., Buffalo, NY	9.5
Newtown/Forms, Inc. (Spectra), Newtown, PA	9.0
Belknap Business Forms, Westfield, NY	8.8
Pavey Envelope & Tag, Jersey City, NJ	7.5
Denney-Reyburn Co., West Chester, PA	7.0
International Business Sys., King of Prussia, PA	7.0
All-States Business Products, Dover, NJ	7.0
OCR Data Systems, Inc., Elmsford, NY	6.5
Bowne & Co., Inc., New York	6.0
ADVERTISING Total 540.3	
The Hibbert Group, Trenton, NJ	44.0
Charles Communications Inc., New York	40.0
Direct Communications Group, Purchase, NY	32.0
Tanagraphics, New York	20.0
Case-Hoyt Corporation, Rochester	20.0
Parkway Sterling Regal, New York	20.0
Lasky Company, Milburn, NJ	20.0
Webcraft Technologies, North Brunswick, NJ	20.0
Lebanon Valley Offset, Annville, PA	20.0
Deven Lithographers, Brooklyn, NY	19.0
Ivy Hill Corporation, New York	17.0
L.P. Thebault Co., Parsippany, NJ	15.5
International Litho., Philadelphia	14.5
Barton Press, West Orange, NJ	14.0
LithoCraft, Inc., Carlstadt, NJ	13.5
Herst Litho, Inc., New York	12.0
Georgian Press, Inc., New York	12.0
Monroe Litho (Graphic Ind.), Rochester, NY	11.5
Enterprise Press, New York	11.0
MGI Industries, Inc., New York	11.0
Laurel Printing Inc., Elmsford, NY	11.0
Lenz & Riecker, Inc., New York	10.0
Bridge Litho., Inc., New York	10.0
Case-Hoyt Corp., Chili, NY	10.0
Sandy Alexander, Inc., Clifton, NJ	10.0
Jersey Printing Co., Inc., Bayonne, NJ	10.0
Direct Press Modern Litho, Huntington Station, NY	9.0
Pace Press (Metro Litho), New York	9.0
Intelligencer Printing Co., Lancaster, PA	8.0
Latham Process Corp., New York	7.0
Consolidated Revere Graphics, Philadelphia	7.0
Bowne & Co., Inc., New York	6.0
Manhardt-Alexander Inc., Amherst, NY	6.0
Artcraft Unlimited Inc., Pittsburgh	5.5
Argus Press Inc., Albany, NY	5.3
Hoffman Printing, Buffalo, NY	5.0
Pace DeTorres (Metro Litho), Moonachie, NJ	4.0
Pictorial Offset Corp., Carlstadt, NJ	3.5
Service Press, Metuchen, NJ	3.5
Baum Printing, Inc., Philadelphia	3.0
Data Papers, Inc., Muncy, PA	3.0
The Adams Group, Inc., New York	3.0
Tabard/Copley Graph. (Pubco), New York	3.0
Keener Mfg., Lancaster, PA	1.5

MID-ATLANTIC REGION

Tables of leading printers given in order of overall market size. This will vary from region to region.

Company, Location	Sales
INSERT	**Total 446.3**
Charles Communications, New York	128.0
R.R. Donnelley & Sons Co., Lancaster, PA	45.0
Sullivan Graphics, Inc., Dunkirk, NY	45.0
Sullivan Graphics, Inc., York, PA	35.0
Quad/Graphics, Inc., Saratoga Springs, NY	35.0
Butler Color Press, Butler, PA	22.5
Webcraft Technologies, North Brunswick, NJ	20.0
Meehan Tooker, East Rutherford, NJ	17.0
Able Printing Co., Cherry Hill, NJ	12.0
Greater Jersey Press, East Brunswick, NJ	10.8
Somerset Publishing Co., Somerset, NJ	10.0
Maxwell Communications, Atglen, PA	10.0
Intelligencer Printing Co., Lancaster, PA	10.0
KTB Associates, Inc., Saugerties, NY	8.5
Typecraft Press Inc., Pittsburgh	8.0
Suburban Publishers, Exeter, PA	7.0
Septum Printing Corp., Oceanside, NY	6.0
Ampco Printing Corporation, Bronx, NY	5.0
Brown Printing Co., East Greenville, PA	5.0
Balan Printing, Inc., Brooklyn, NY	2.5
Drucker Printing (Meehan-Tooker), Linden, NJ	2.0
Wood Press, Inc., Paterson, NJ	2.0

Company, Location	Sales
BOOK	**Total 426.5**
Arcata Graphics Company, Depew, NY	55.0
Arcata Graphics Company, Fairfield, PA	55.0
Maple-Vail Book Group, York, PA	43.0
Haddon Craftsmen (Sullivan), Scranton, PA	40.0
Offset Paperback (Bertelsmann), Dallas, PA	37.0
Horowitz/Rae, Fairfield, NJ	27.0
National Publishing (Courier), Philadelphia	26.7
Maple-Vail Book Group, Binghamton, NY	22.0
MacNaughton Einson Graphics, Fairlawn, NJ	18.0
L.P. Thebault Company, Parsippany, NJ	14.0
Braceland Brothers, Inc., Philadelphia	12.0
Hamilton Printing, Castleton, NY	10.0
Crest Litho, Inc., Watervliet, NY	9.3
Lenz & Riecker, Inc., New York	9.0
Algen Press Corp., College Point, NY	7.5
Boyd Printing Company, Inc., Albany, NY	6.5
L.K. Litho, Middle Island, NY	6.0
Dynamic Graphic Finishing, Horsham, PA	5.0
Sorg Inc., New York	5.0
Pearl-Pressman-Liberty, Philadelphia	4.0
Wickersham Printing Co., Lancaster, PA	3.0
Penn Colour Graphics, Huntingdon Valley, PA	3.0
Waldman Graphics, Inc., Pennsauken, NJ	2.5
Canterbury Press, Rome, NY	2.0
Science Press, Ephrata, PA	2.0
Fort Orange Press, Inc., Albany, NY	2.0

Company, Location	Sales
DIRECT MAIL	**Total 425.2**
Webcraft Technologies, North Brunswick, NJ	85.0
Charles Communications Inc., New York	42.0
Meehan Tooker, East Rutherford, NJ	33.0
Scanforms, Inc., Bristol, PA	20.6
Mars Graphic Services, Inc., Westville, NJ	16.1
Lasky Company, Milburn, NJ	16.0
Smith-Edwards-Dunlap Co., Philadelphia	15.5
Newtown/Forms (Spectra), Newtown, PA	15.0
Pictorial Offset Corp., Carlstadt, NJ	13.5
Laurel Printing Inc., Elmsford, NY	13.0
Metro Seliger Ind., Woodside, NY	12.0
Sandy-Alexander, Inc., Clifton, NJ	10.0
International Litho, Philadelphia	10.0
Ampco Printing Corp., Bronx, NY	10.0
Enterprise Press, New York	10.0
Intelligencer Printing Co., Lancaster, PA	9.0
Pace DeTorres (Metro Litho), Moonachie, NJ	8.0
American Fiber-Velope Mfg. Co., Collingdale, PA	8.0
Newtown Press, Plainview, NY	7.0
Able Printing Co., Cherry Hill, NJ	7.0
International Envelope Co., Aston, PA	6.5
Scott Printing Corp., Jersey City, NJ	6.0
Service Press, Metuchen, NJ	6.0
LithoCraft, Inc., Carlstadt, NJ	5.5
Colorforms, Inc. (MGI), Tonawanda, NY	5.0
SBF Communication Graph., Philadelphia	5.0
Pavey Envelope & Tag Corp., Jersey City, NJ	3.5
Bregg Data Forms, Inc., Hauppauge, NY	3.5
Wood Press, Inc., Paterson, NJ	3.5
OCR Data Systems, Inc., Elmsford, NY	3.0
SLC Graphics, Inc., Pittston, PA	3.0
Drucker Printing (Meehan-Tooker), Linden, NJ	3.0
Baum Printing, Inc., Philadelphia	3.0
Septum Printing Corp., Oceanside, NY	2.5
Balan Printing, Inc., Brooklyn, NY	2.0
Data Papers, Inc., Muncy, PA	2.0
International Business Sys., King of Prussia, PA	1.5

Company, Location	Sales
PREPRESS	**Total 372.7**
Applied Graphics Technologies, New York	73.0
Potomac Graphic Ind., New York	28.0
Master Eagle Graphic Services, New York	23.0
Lincoln Graphics, Inc., Cherry Hill, NJ	19.0
Kwik International Color, New York	18.5
Phototype Color Graphics, Pennsauken, NJ	18.1
GS Imaging (Techtron), Carlstadt, NJ	18.0
Quality House of Graphics, Long Island City, NY	18.0
York Graphic Services, Inc., York, PA	15.0
Offset Separations, New York	14.5
Armotek Industries, Inc., Palmyra, NJ	13.8
The Beck Company, Langhorne, PA	12.0
Walker-Prismatic Engraving, New York	11.0
Tartaro Slavin Colour Service, New York	10.0
Tapley-Rutter Co. (Donnelley), Moonachie, NJ	10.0
Data Comp Corp. (Volt), Voorhees, NJ	10.0
Haddon Craftsmen (Sullivan), Allentown, PA	8.0
Gotham Graphics Inc., Lyndhurst, NJ	7.2
Waldman Graphics, Inc., Pennsauken, NJ	7.0
Lancaster Press, Inc., Lancaster, PA	6.0
Haddon Craftsmen (Sullivan), Scranton, PA	6.0
Compton Press, Morris Plains, NJ	5.0
Science Press, Ephrata, PA	4.0
MGI Industries, Inc., New York	3.5
Publishers Book Bindery, Long Island City, NY	3.0
Graphic Industries, Inc., Carlstadt, NJ	3.0
Pearl-Pressman-Liberty, Philadelphia	2.5
Western Publishing Group, New york	2.5
Tele Composition (Alcom), Clifton Heights, PA	2.0
L.K. Litho, Middle Island, NY	2.0
Argus Press Inc., Albany, NY	1.2
Boyd Printing Company, Albany, NY	.0

Company, Location	Sales
CATALOG	**Total 363.0**
R.R. Donnelley/Lancaster East, Lancaster, PA	65.0
R.R. Donnelley/Steel Way, Lancaster, PA	50.0
Lasky Company, Milburn, NJ	20.0
Suburban Publishers, Exeter, PA	19.0
Direct Press Modern Litho, Huntington Station, NY	18.0
Meehan Tooker, East Rutherford, NJ	16.0
Case-Hoyt Corporation, Rochester, NY	15.0
Sandy-Alexander, Inc., Clifton, NJ	12.0
Case-Hoyt Corporation, Chili, NY	10.0
Braceland Brothers, Inc., Philadelphia	9.0
L.P. Thebault Company, Parsippany, NJ	9.0
Waldman Graphics, Inc., Pennsauken, NJ	8.5
Haddon Craftsmen (Sullivan), Scranton, PA	7.0
Mack Printing Company, Easton, PA	7.0
MGI Industries/Colorforms, New York	6.5
Latham Process Corp., New York	6.0
LithoCraft, Inc., Carlstadt, NJ	6.0
Metro Litho, Moonachie, NJ	6.0
Pearl-Pressman-Liberty, Inc., Philadelphia	6.0
Lebanon Valley Offset, Annville, PA	6.0
Lenz & Riecker, Inc., New York, NY	5.5
Monroe Litho, Inc., Rochester, NY	5.5
Sowers Printing Co., Lebanon, PA	5.0
Havertown Printing Co. (Alcom), Broomall, PA	5.0
Arcata Graphics Company, Depew, NY	5.0
Brown Printing Company, East Greenville, PA	5.0
Baum Printing (Graphic Ind.), Philadelphia	4.0
Wood Press, Inc., Paterson, NJ	3.0
L.K. Litho, Middle Island, NY	3.0
Crest Litho, Inc., Watervliet, NY	3.0
Science Press (Monroe), Ephrata, PA	2.0
Drucker Printing (Meehan-Tooker), Linden, NJ	2.0
Balan Printing, Inc., Brooklyn, NY	2.0
Fort Orange Press, Inc., Albany, NY	1.5
Canterbury Press, Rome, NY	1.5
Wickersham Printing Co., Lancaster, PA	1.0

Company, Location	Sales
LABEL	**Total 361.0**
International Paper Co., Purchase, NY	85.0
Patton (Engraph, Inc.), Moorestown, NJ	40.0
Topflight Corp., York, PA	21.0
Bertek, Fort Lee, NJ	20.0
Allegheny Label, Inc., Cheswick, PA	19.5
National Label Co., Lafayette Hills, PA	18.0
Denney-Reyburn Co., West Chester, PA	18.0
York Tape & Label (Uarco), York, PA	18.0
Transkrit Corp., Brewster, NY	15.5
Globe Ticket & Label (Empery), Warminster, PA	13.5
Rothchild Printing Company, Elmhurst, NY	11.5
McCourt Label Co., Lewis Run, PA	11.0
Ever Ready Label Corp., Belleville, NJ	10.5
Tolas Health Care Packaging, Newtown, PA	10.0
Carci Alfi Forms & Labels Inc., Hauppauge, NY	9.0
Calmont Label Co., Northvale, NJ	8.0
May Tag & Label Corp., Hillside, NJ	7.5
Wise Tag & Label Co., Pennsauken, NJ	5.5
Pavey Envelope & Tag Corp., Jersey City, NJ	5.5
F.M. Howell & Co., Elmira, NY	5.0
Keener Manufacturing, Lancaster, PA	3.5
Mastercraft Litho (Alford), Ridgefield, NJ	3.0
Wood Press, Inc., Paterson, NJ	1.5
Interform Corporation, Bridgeville, PA	1.0

Company, Location	Sales
DIRECTORY	**Total 207.0**
R.R. Donnelley & Sons Co., Lancaster, PA	135.0
Colonial Penn Insurance Co., Philadelphia	51.5
Havertown Printing (Alcom), Broomall, PA	10.0
Latham Process Corp., New York	4.0
Science Press (Monroe), Ephrata, PA	3.0
Wickersham Printing Co., Lancaster, PA	2.0
Balan Printing, Inc., Brooklyn, NY	1.5

Company, Location	Sales
GREETING CARDS	**Total 24.0**
Burgoyne, Inc., Philadelphia	12.0
Rousana Greeting Cards, Lakewood, NJ	5.5
Alfred Mainzer Inc., Long Island City, NY	3.5
Brett-Forer Greetings, New York	3.0

Figures given for sales are in millions of dollars. Data taken from Printmarkets, Trade & Technology Press, Stamford, Conn.

If you'd like to rent the list of names of people in any of the printing establishments in this section, please contact Jim Long, Direct Mail Services, Cahners Publishing, 249 W. 17th St., N.Y.C., N.Y. 10011; or call 1-800-537-7930.